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# Workers' Compensation Medicare Set-Aside Portal (WCMSAP)

## Basic Functions Account Manager

Version 3.1, 3/31/2013  
CMS reserves the right to modify this presentation. To ensure you have the most current version, verify that the version and date on this page match the version and date on the corresponding page of the PDF currently available on <http://www.cms.gov/Medicare/Medicare.html>.

**Slide notes**

Welcome to the Workers' Compensation Medicare Set-Aside Portal (WCMSAP) Basic Functions-Account Manager course.

As a reminder, you may view the slide number you are on by clicking on the moving cursor.

Additionally, you can view the narration by clicking the Closed Captioning [CC] button in the lower right hand corner of the screen.

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## Disclaimer

While all information in this document is believed to be correct at the time of writing, this Computer Based Training (CBT) is for educational purposes only and does not constitute official Centers for Medicare & Medicaid Services (CMS) instructions for the WCMSAP. All affected entities are responsible for following the applicable CMS instructions found at the following link:

<http://www.cms.gov/WorkersCompAgencyServices/>.

## Slide notes

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## Course Overview

- Role of Account Manager
- Basic Functions
  - Manage account profile
  - Designee maintenance

**Slide notes**

This course describes the role and the basic functions available to the Account Manager including managing the account profile and designee maintenance.

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## Account Manager - Role

Each WCMSAP account must have an Account Manager

- Established during Account Setup
- One per WCMSAP account

Controls the administration of account and manages cases

Can only be associated with one WCMSAP account

Registered user of system

Has unlimited access to WCMSAP functionality

- After they review, sign, and return profile report to the COBC

### Slide notes

Each WCMSAP account must have an assigned Account Manager. The Account Manager is established during the Account Setup process. Each WCMSAP account can have only one Account Manager.

This is the individual who controls the administration of an organization's account and manages cases, which includes managing case access.

The Account Manager can only be associated with one WCMSAP account. The Account Manager is a registered user of the system.

The Account Manager for Representative and Self accounts will have unlimited access to WCMSAP functionality and cases as soon as the Coordination of Benefits Contractor (COBC) has received their signed profile report.

For Corporate account types, the Account Manager will only be granted access after the profile report is signed and returned by the Account Representative.

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**Slide notes**

The Account Manager for Self account types is, by default, the submitter.

For Corporate and Representative account types, the Account Manager is assigned during the Account Setup process.

For Representative accounts, the submitter may be the Account Manager, but they have the option to assign the Account Manager role to another person.

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## Account Manager - Basic Functions

Manages the account profile and updates account information

Submits new cases

Can view and update cases

Can add or replace documentation

Can invite Account Designees

- Corporate/Representative account types only

Can associate Account Designees to cases

Can revoke Account Designees' access

Can submit a single case, for themselves or as Representative Payee

- Self account types only

### Slide notes

The Account Manager manages the WCMSAP account's profile information and updates general account information; Submits new cases for the WCMSAP account they are associated with;



Can view and update all cases for the WCMSAP account they are associated with; Can add or replace documentation to a specific case for the account; Can invite other users to function as Account Designees. (Account Designees are for Corporate or Representative account types only.);

Can associate an Account Designee to cases; Can revoke Account Designee's' access to cases and/or an entire WCMSAP account; Can submit a single case, as an Account Manager or as a Representative Payee. (For Self account types only.);

To replace an Account Manager, the Account Representative for Corporate accounts, or the original submitter for Representative accounts, must contact the COBC Electronic Data interchange (EDI) Department.



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**Workers' Compensation Medicare Set-Aside Web Portal**

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## Welcome to the WCMSAP

This site provides an interface for entry of Workers' Compensation Medicare Set-Aside Arrangements (WCMSA) proposals. Attorneys, Medicare beneficiaries, claimants, insurance carriers and WCMSA vendors may use this site to enter the case information directly. The site also provides attorneys, Medicare beneficiaries, claimants, insurance carriers, and WCMSA vendors with the ability to track their submitted cases and the statuses without inquiry to the Coordination of Benefits Contractor (COBC) or the Centers for Medicare & Medicaid Services (CMS).

### WCMSAP Messages

This space is reserved for system messages from the Coordination of Benefits Contractor. Check this location for important information regarding system outages, scheduled maintenance and special announcements.

### GETTING STARTED

For more information, refer to How To Get Started under the How To menu option.

**STEP 1**

New Registration ➔

**STEP 2**

Account Setup ➔

(Account ID and PIN required)

**Sign into your account**

User Name:  
  
[Forgot ID](#)

Password:  
  
[Forgot Password](#)

Login Clear

## Slide notes

To access a WCMSAP account and manage the case submission process, the Account Manager must first successfully login to the WCMSAP application.

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The screenshot displays the WCMSAP (Workers' Compensation Medicare Set-Aside Web Portal) home page. At the top left is the CMS logo with the text "CENTERS for MEDICARE & MEDICAID SERVICES". To its right is the title "Workers' Compensation Medicare Set-Aside Web Portal" and the COB logo. A "Skip Navigation" link is located at the top right. Below the title is a navigation bar with links: "About This Site", "CMS Links", "How To...", "Reference Materials", and "Contact Us". The main content area features the heading "WCMSAP" in yellow. Below it, a paragraph explains the portal's purpose: "The WCMSAP provides an interface for entry of Workers' Compensation Medicare Set-Aside (WCMSA) proposals. You may use this site to enter the case information directly. The site also provides the ability to track submitted cases and the statuses without inquiry to COBC or CMS. Case Lookup and View Alert functions are also available. Click the desired link below to perform that function." Another paragraph states: "You may modify Account Settings by clicking the appropriate link under the Account Settings list." Below this, a section titled "I'd like to..." contains three links: "Create a New Case", "Case Lookup", and "View Alerts". On the right side, there is a "QUICK HELP" section with a link "Help About This Page". Below that is an "Account Settings" section with five links: "Update Personal Information", "Update Account Information", "Designee Maintenance", "View Account Activity", and "Change Password".

## Slide notes

After a successful logon, the WCMSAP Home page will display.



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The screenshot shows the homepage of the Workers' Compensation Medicare Set-Aside Web Portal (WCMSAP). The header features the CMS logo (Centers for Medicare & Medicaid Services) and the COB logo. The main title is "Workers' Compensation Medicare Set-Aside Web Portal". A navigation bar includes links for "About This Site", "CMS Links", "How To...", "Reference Materials", and "Contact Us". A "Skip Navigation" link is also present. The main content area is titled "WCMSAP" and contains a paragraph explaining the portal's purpose: "The WCMSAP provides an interface for entry of Workers' Compensation Medicare Set-Aside (WCMSA) proposals. You may use this site to enter the case information directly. The site also provides the ability to track submitted cases and the statuses without inquiry to COBC or CMS. Case Lookup and View Alert functions are also available. Click the desired link below to perform that function." Below this, a section titled "I'd like to..." lists three links: "Create a New Case", "Case Lookup", and "View Alerts". On the right side, there is a "QUICK HELP" section with a link "Help About This Page". Below that is an "Account Settings" section with five links: "Update Personal Information", "Update Account Information", "Designee Maintenance", "View Account Activity", and "Change Password".

**WCMSAP**

The WCMSAP provides an interface for entry of Workers' Compensation Medicare Set-Aside (WCMSA) proposals. You may use this site to enter the case information directly. The site also provides the ability to track submitted cases and the statuses without inquiry to COBC or CMS. Case Lookup and View Alert functions are also available. Click the desired link below to perform that function.

You may modify Account Settings by clicking the appropriate link under the Account Settings list.

**I'd like to...**

- [Create a New Case](#)
- [Case Lookup](#)
- [View Alerts](#)

**QUICK HELP**

- [Help About This Page](#)

**Account Settings**

- [Update Personal Information](#)
- [Update Account Information](#)
- [Designee Maintenance](#)
- [View Account Activity](#)
- [Change Password](#)

## Slide notes

From this page, the Account Manager can manage cases and manage account access.

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The screenshot shows the WCMSAP homepage. At the top left is the CMS logo with the text "CENTERS for MEDICARE & MEDICAID SERVICES". To its right is the title "Workers' Compensation Medicare Set-Aside Web Portal" and a COB logo. A "Skip Navigation" link is on the far right. Below the title is a blue navigation bar with links: "About This Site", "CMS Links", "How To...", "Reference Materials", and "Contact Us". The main content area is titled "WCMSAP" and contains a paragraph explaining the site's purpose. Below this is a section "I'd like to..." with links: "Create a New Case", "Case Lookup", and "View Alerts". On the right side, there is a "QUICK HELP" section with a link "Help About This Page". Below that is an "Account Settings" section, which is highlighted with a yellow box. This section contains links: "Update Personal Information", "Update Account Information" (highlighted with a yellow box), "Designee Maintenance" (highlighted with a yellow box), "View Account Activity", and "Change Password".

**WCMSAP**

The WCMSAP provides an interface for entry of Workers' Compensation Medicare Set-Aside (WCMSA) proposals. You may use this site to enter the case information directly. The site also provides the ability to track submitted cases and the statuses without inquiry to COBC or CMS. Case Lookup and View Alert functions are also available. Click the desired link below to perform that function.

You may modify Account Settings by clicking the appropriate link under the Account Settings list.

**I'd like to...**

- [Create a New Case](#)
- [Case Lookup](#)
- [View Alerts](#)

**QUICK HELP**

- [Help About This Page](#)

**Account Settings**


- [Update Personal Information](#)
- [Update Account Information](#)
- [Designee Maintenance](#)
- [View Account Activity](#)
- [Change Password](#)

**Slide notes**

Case access is controlled through the Account Settings. Although Account Managers have access to all of the Account Settings, the focus of this CBT is on Update Account Information and Designee Maintenance.

For more information on the other Account Settings, please see the Login and User Maintenance CBT.

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**CMS** Workers' Compensation Medicare Set-Aside Web Portal 

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## WCMSAP

The WCMSAP provides an interface for entry of Workers' Compensation Medicare Set-Aside (WCMSA) proposals. You may use this site to enter the case information directly. The site also provides the ability to track submitted cases and the statuses without inquiry to COBC or CMS. Case Lookup and View Alert functions are also available. Click the desired link below to perform that function.

You may modify Account Settings by clicking the appropriate link under the Account Settings list.

**I'd like to...**

- [Create a New Case](#)
- [Case Lookup](#)
- [View Alerts](#)

**QUICK HELP**

- [Help About This Page](#)

**Account Settings**

- [Update Personal Information](#)
- [Update Account Information](#)
- [Designee Maintenance](#)
- [View Account Activity](#)
- [Change Password](#)

## Slide notes

To revise account information, the Account Manager will click the Update Account Information link in the Account Settings box on the Home page.

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The screenshot displays the CMS Workers' Compensation Medicare Set-Aside Web Portal. The header includes the CMS logo, the portal title, and a COB logo. A navigation bar contains links: About This Site, CMS Links, How To..., Reference Materials, and Contact Us. A 'Skip Navigation' link is also present. The main heading is 'Update Corporate Information', with a 'Print this page' link and a 'QUICK HELP' button. A note states: 'You may edit the account information or Account Representative information by clicking on the Edit button of that section. You may not change the Account Type.' The 'Account Type' is set to 'Corporate'. The page is divided into two sections: 'Corporate Information' and 'Account Representative Information', each with an 'Edit' button. The 'Corporate Information' section includes fields for Employer Identification Number (EIN), Corporate Name, Business Mailing Address (Address Line 1, Address Line 2, City, State, Zip Code), and buttons for 'Previous' and 'Next'. The 'Account Representative Information' section includes fields for First Name, Last Name, Title, Date of Birth, E-Mail Address, Phone, and Fax.

**CMS** Workers' Compensation Medicare Set-Aside Web Portal

[Skip Navigation](#)

[About This Site](#) [CMS Links](#) [How To...](#) [Reference Materials](#) [Contact Us](#)

## Update Corporate Information

[Print this page](#) **QUICK HELP**  
[Help About This Page](#)

You may edit the account information or Account Representative information by clicking on the Edit button of that section.  
You may not change the Account Type.

Account Type: Corporate

**Corporate Information** [Edit](#)

Employer Identification Number (EIN): #####  
Corporate Name: AAAAAAAAAAAAA  
Business Mailing Address:  
Address Line 1: AAAAAAAAAAAAA  
Address Line 2: AAAAAAAAAAAAA  
City: AAAAAAAAAAAAA  
State: AAAAAAAAAAAAA  
Zip Code: #####  
[Previous](#) [Next](#)

**Account Representative Information** [Edit](#)

First Name: FIRST MI: M Last Name: LAST  
Title: AAAAAAAAAAAAA  
Date of Birth: #####  
E-Mail Address: AAAAAAAAAAAAA  
Phone: ###-###-#### ext. ####  
Fax: ###-###-####


**Slide notes**

When the Update Account Information link is clicked, an Update Information page will display.

The one pictured here, Update Corporate Information page, is what will display for Corporate users. This page lists the account's mailing address, and Account Representative contact information.

Please note: The Update Information screens for Representative and Self account types are very similar and function the same way.

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**CMS** Workers' Compensation Medicare Set-Aside Web Portal 

[Skip Navigation](#)

[About This Site](#) [CMS Links](#) [How To...](#) [Reference Materials](#) [Contact Us](#)

**Update Corporate Information** [Print this page](#) **QUICK HELP**  
[Help About This Page](#)

You may edit the account information or Account Representative information by clicking on the Edit button of that section.  
You may not change the Account Type.

Account Type: Corporate

**Corporate Information** **Edit** **Account Representative Information** **Edit**

Employer Identification Number (EIN): #####

Corporate Name: AAAAAAAAAAAAAA

Business Mailing Address:

Address Line 1: AAAAAAAAAAAAAA

Address Line 2: AAAAAAAAAAAAAA

City: AAAAAAAAAAAAAA

State: AAAAAAAAAAAAAA

Zip Code: #####

First Name: FIRST MI: M Last Name: LAST

Title: AAAAAAAAAAAAAA

Date of Birth: ####/####

E-Mail Address: AAAAAAAAAAAAAA

Phone: ###-###-#### ext. ####

Fax: ###-###-####



[Previous](#) [Next](#)

## Slide notes

To make any corrections, click the Edit button next to the section that requires revisions to return to that page.

Note: If the Account Manager needs to replace their Account Representative with another person, they may do so by editing the Account Representative Information page.

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**Workers' Compensation Medicare Set-Aside Web Portal**

[Skip Navigation](#)

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## Corporate Information

An asterisk (\*) indicates a required field.

**QUICK HELP**  
[Help About This Page](#)

Employer Identification Number (EIN): \*

Corporation Name: \*

Business Mailing Address:

Address Line 1: \*

Address Line 2:

City: \*

State: \*

Zip Code: \*


## Slide notes

Change or correct any of the information as needed.



## Slide 15 - of 53

The screenshot shows the 'Corporate Information' page of the CMS Workers' Compensation Medicare Set-Aside Web Portal. The page header includes the CMS logo, the portal title, and a COB logo. A navigation bar contains links: 'About This Site', 'CMS Links', 'How To...', 'Reference Materials', and 'Contact Us'. A 'Skip Navigation' link is also present. The main content area is titled 'Corporate Information' and includes a note: 'An asterisk (\*) indicates a required field.' The form fields are: 'Employer Identification Number (EIN): \*' (text box), 'Corporation Name: \*' (text box), 'Business Mailing Address:' (section header), 'Address Line 1: \*' (text box), 'Address Line 2:' (text box), 'City: \*' (text box), 'State: \*' (dropdown menu with '- Select -'), and 'Zip Code: \*' (two text boxes). A 'QUICK HELP' box with a 'Help About This Page' link is on the right. At the bottom, there are 'Previous', 'Next', and 'Cancel' buttons. A blue arrow points from the 'Next' button to the 'Business Mailing Address' section.

**CMS** Workers' Compensation Medicare Set-Aside Web Portal 

[Skip Navigation](#)

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### Corporate Information

An asterisk (\*) indicates a required field.

**QUICK HELP**  
[Help About This Page](#)

Employer Identification Number (EIN): \*

Corporation Name: \*

Business Mailing Address:

Address Line 1: \*

Address Line 2:

City: \*



State: \*

Zip Code: \*

## Slide notes


Once all corrections have been made, click Next at the bottom of the page to navigate back to the Update Corporate Information page.

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**Workers' Compensation Medicare Set-Aside Web Portal**

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



 [Print this page](#)

**Update Corporate Information**

**QUICK HELP**  
[Help About This Page](#)

You may edit the account information or Account Representative information by clicking on the Edit button of that section.  
You may not change the Account Type.



Account Type: Corporate

<b>Corporate Information</b> 	<b>Account Representative Information</b> 
Employer Identification Number (EIN): #####	First Name: FIRST MI: M Last Name: LAST
Corporate Name: AAAAAAAAAAAAAA	Title: AAAAAAAAAA
Business Mailing Address:	Date of Birth: ####/####
Address Line 1: AAAAAAAAAAAAAA	E-Mail Address: AAAAAAAAAA
Address Line 2: AAAAAAAAAA	Phone: ###-###-#### ext. ####
City: AAAAAAAAAAAAAA	Fax: ###-###-####
State: AAAAAAAAAA	
Zip Code: #####	
 	

## Slide notes


After you have returned to the Update Information page, click the Next button.

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**Workers' Compensation Medicare Set-Aside Web Portal**

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 [Print this page](#)

**QUICK HELP**  
[Help About This Page](#)

### Update Corporate Information

You may edit the account information or Account Representative information by clicking on the Edit button of that section.  
You may not change the Account Type.



Account Type: Corporate

<b>Corporate Information</b> <input type="button" value="Edit"/>	<b>Account Representative Information</b> <input type="button" value="Edit"/>
Employer Identification Number (EIN): #####	First Name: FIRST MI: M Last Name: LAST
Corporate Name: AAAAAAAAAAAAA	Title: AAAAAAAAAA
Business Mailing Address:	Date of Birth: ####/####
Address Line 1: AAAAAAAAAAAAA	E-Mail Address: AAAAAAAAAA
Address Line 2: AAAAAAAAAA	Phone: ###-###-#### ext. ####
City: AAAAAAAAAAAAA	Fax: ###-###-####
State: AAAAAAAAAA	
Zip Code: #####	
<input type="button" value="Previous"/> <input type="button" value="Next"/>	

## Slide notes

The system will display a warning message when a change is made to the WCMSAP account information indicating that the updated information will be used for all future official communications.


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## Corporate Information Update Confirmation

 [Print this page](#)

QUICK HELP

[Help About This Page](#)

Your corporate information has been updated. Print this page for your records.

**Account Type:** Corporate

**Corporate Information**

**Employer Identification Number (EIN):** #####

**Corporate Name:** AAAAAAAAAA

**Business Mailing Address:**

**Address Line 1:** AAAAAAAAAA

**Address Line 2:** AAAAAAAAAA

**City:** AAAAAAAAAA

**State:** AAAAAAAAAA

**Zip Code:** #####

[Return to Home](#)

**Account Representative Information**

**First Name:** FIRST MI: M **Last Name:** LAST

**Title:** AAAAAAAAAA

**Date of Birth:** ####/####

**E-Mail Address:** AAAAAAAAAA



**Phone:** ###-###-#### **ext.** ####

**Fax:** ###-###-####

## Slide notes


Next, the system will display the Corporate Information Update Confirmation page, showing the updated information.

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 [Print this page](#)

**QUICK HELP**  
[Help About This Page](#)

### Corporate Information Update Confirmation

Your corporate information has been updated. Print this page for your records.

**Account Type:** Corporate

**Corporate Information**  
**Employer Identification Number (EIN):** #####  
**Corporate Name:** AAAAAAAAAA  
**Business Mailing Address:**  
**Address Line 1:** AAAAAAAAAA  
**Address Line 2:** AAAAAAAAAA  
**City:** AAAAAAAAAA  
**State:** AAAAAAAAAA  
**Zip Code:** #####  
[Return to Home](#)

**Account Representative Information**  
**First Name:** FIRST MI: M **Last Name:** LAST  
**Title:** AAAAAAAAAA  
**Date of Birth:** ####/####  
**E-Mail Address:** AAAAAAAAAA  
**Phone:** ###-###-#### **ext.** ####  
**Fax:** ###-###-####



## Slide notes

With the exception of a modification to an e-mail address, the system will send an e-mail to the Account Manager, indicating that the account information has been changed.

Included in the e-mail notification will be a profile report.


The Account Manager will be instructed to notify the COBC if they did not initiate the update.

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 [Print this page](#)

**QUICK HELP**  
[Help About This Page](#)

## Corporate Information Update Confirmation

Your corporate information has been updated. Print this page for your records.

<b>Account Type:</b> Corporate	
<b>Corporate Information</b>	<b>Account Representative Information</b>
<b>Employer Identification Number (EIN):</b> #####	<b>First Name:</b> FIRST MI: M <b>Last Name:</b> LAST
<b>Corporate Name:</b> AAAAAAAAAA	<b>Title:</b> AAAAAAAAAA
	<b>Date of Birth:</b> ####/####
<b>Business Mailing Address:</b>	<b>E-Mail Address:</b> AAAAAAAAAA
<b>Address Line 1:</b> AAAAAAAAAA	<b>Phone:</b> ### ###-#### <b>ext.</b> ####
<b>Address Line 2:</b> AAAAAAAAAA	<b>Fax:</b> ### ###-####
<b>City:</b> AAAAAAAAAA	
<b>State:</b> AAAAAAAAAA	
<b>Zip Code:</b> #####	
<a href="#">Return to Home</a>	

## Slide notes

Click the Return to Home button to return to the WCMSAP Home page.



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## Update Account Information

- When e-mail address has been changed:
  - System sends e-mail to old e-mail address
  - E-mail recipient is instructed to
    - Click on link to proceed if they initiated change
    - Not click link and notify COBC if they did not initiate change
  - If recipient clicks link, e-mail is sent to new address

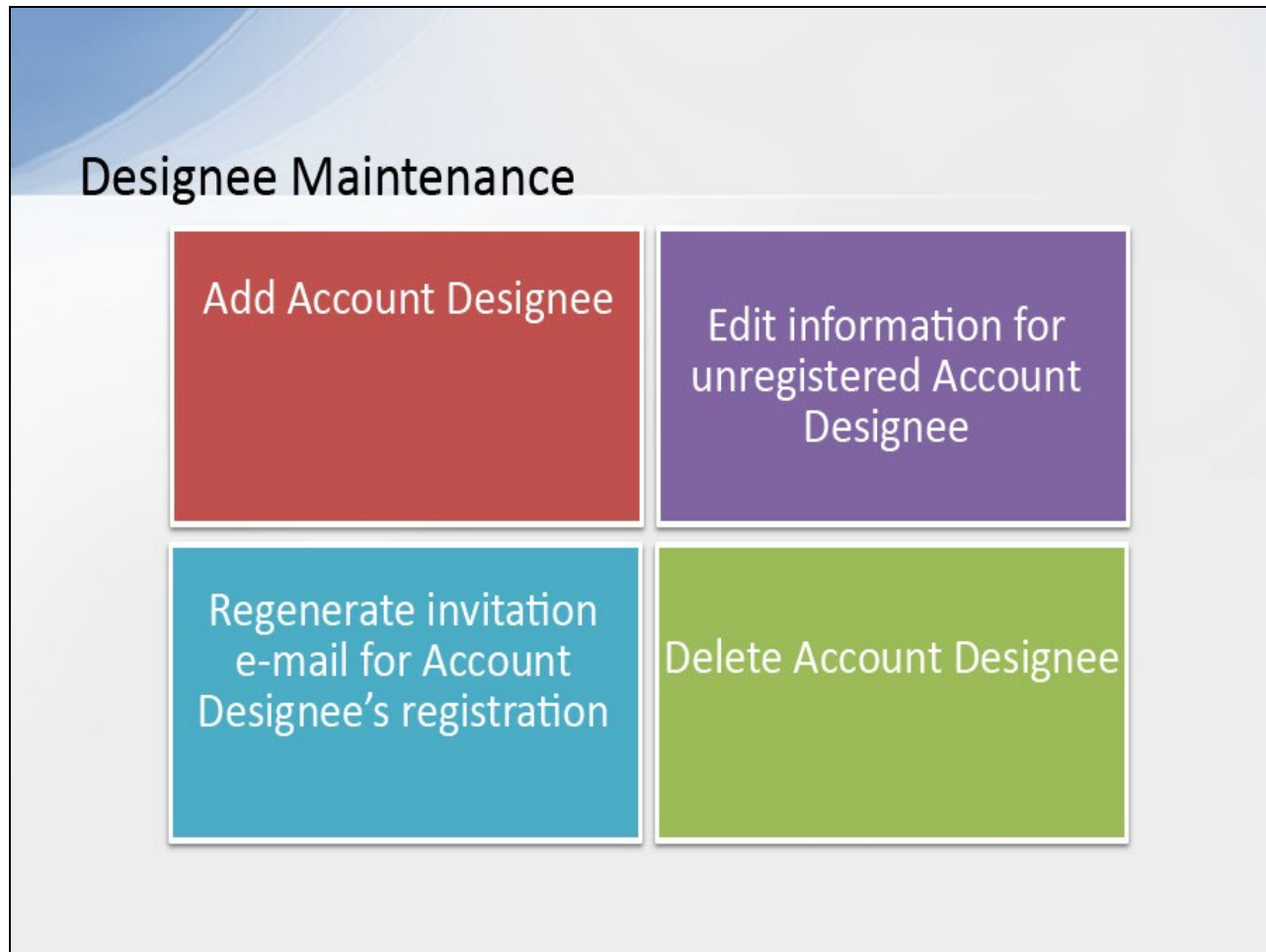
**Slide notes**

When an e-mail address has been changed, the system will: Send an e-mail to the old e-mail address stating that an e-mail address change has been requested.

The e-mail recipient will be instructed to click on a link to proceed with the change, but only if they initiated the change.

The recipient will be instructed not to click the link and to notify the COBC if they did not initiate the e-mail address change. If the recipient clicks the link, an e-mail reflecting the change will then be sent to the new e-mail address.

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**Slide notes**

For Corporate and Representative accounts, the Account Manager may designate one or more Account Designees to assist with case submission and management.

The Account Manager can perform the following Designee Maintenance functions:

Add an Account Designee, Edit information for an unregistered Account Designee, Regenerate an invitation e-mail with a token link for an Account Designee's registration, and Delete an Account Designee.

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## WCMSAP

The WCMSAP provides an interface for entry of Workers' Compensation Medicare Set-Aside (WCMSA) proposals. You may use this site to enter the case information directly. The site also provides the ability to track submitted cases and the statuses without inquiry to COBC or CMS. Case Lookup and View Alert functions are also available. Click the desired link below to perform that function.

You may modify Account Settings by clicking the appropriate link under the Account Settings list.

**I'd like to...**

- [Create a New Case](#)
- [Case Lookup](#)
- [View Alerts](#)

**QUICK HELP**

- [Help About This Page](#)



**Account Settings**

- [Update Personal Information](#)
- [Update Account Information](#)
- [Designee Maintenance](#)
- [View Account Activity](#)
- [Change Password](#)

## Slide notes

To manage Account Designees, the Account Manager will click the Designee Maintenance link from the Account Settings menu.

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**Workers' Compensation Medicare Set-Aside Web Portal**

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### Designee Listing

This page provides the Designee(s) information for the individuals you have assigned to the account.

An Account Manager can only make changes to a pending Designee. Once the Designee has registered and has a Login ID, the Account Manager cannot make changes to the Designee information other than deleting the Designee from the account.


To make changes to the account of a particular Designee listed, select the link on the individual's last name. To delete a Designee select the Delete function to the left of the individual's name. Use the **Add a Designee** function to include an individual as a designee. Individuals added as designees will receive an e-mail notifying them that they have been invited to be a designee for the account.

Delete	Last Name	First Name	E-mail Address	Passphrase	Status
X	LAST	FIRST	AAAAAAAAAAAAA	AAAAAAA	Active
X	<a href="#">LAST</a>	FIRST	AAAAAAAAAAAAA	AAAAAAA	Pending

## Slide notes

The Designee Listing page will display. All Designees and their associated statuses (Pending, Active, Locked, Expired, Revoked) will be listed.

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### Designee Listing

This page provides the Designee(s) information for the individuals you have assigned to the account.

An Account Manager can only make changes to a pending Designee. Once the Designee has registered and has a Login ID, the Account Manager cannot make changes to the Designee information other than deleting the Designee from the account.

To make changes to the account of a particular Designee listed, select the link on the individual's last name. To delete a Designee select the Delete function to the left of the individual's name. Use the **Add a Designee** function to include an individual as a designee. Individuals added as designees will receive an e-mail notifying them that they have been invited to be a designee for the account.


Delete	Last Name	First Name	E-mail Address	Passphrase	Status
X	<a href="#">LAST</a>	FIRST	AAAAAAAAAAAAA	AAAAAAA	Active
X	<a href="#">LAST</a>	FIRST	AAAAAAAAAAAAA	AAAAAAA	Pending

[Add a Designee](#) [Return Home](#)

## Slide notes


To add a potential Account Designee, the Account Manager must first invite them. To initiate this process, click Add a Designee.

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## Designee Information

Please click the 'Next' button to check the E-Mail Address of a potential designee. To cancel and return to the Designee Listing page, click the 'Previous' button.

An asterisk (\*) indicates a required field. We ask for the e-mail address to verify if the person is currently a registered user.

Designee E-mail Address: \*



Re-enter Designee E-mail Address: \*

## Slide notes

The Designee Information page displays.



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**Workers' Compensation Medicare Set-Aside Web Portal**

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---

## Designee Information

---

Please click the 'Next' button to check the E-Mail Address of a potential designee. To cancel and return to the Designee Listing page, click the 'Previous' button.

An asterisk (\*) indicates a required field. We ask for the e-mail address to verify if the person is currently a registered user.



Designee E-mail Address: \*

Re-enter Designee E-mail Address: \*

**Slide notes**

The Account Manager will enter and re-enter the e-mail address of the Account Designee they wish to invite and then click Next to continue.

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## Designee Information

Please click the 'Next' button to check the E-Mail Address of a potential designee. To cancel and return to the Designee Listing page, click the 'Previous' button.

An asterisk (\*) indicates a required field. We ask for the e-mail address to verify if the person is currently a registered user.

Designee E-mail Address: \*

Re-enter Designee E-mail Address: \*

## Slide notes

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## Designee Maintenance

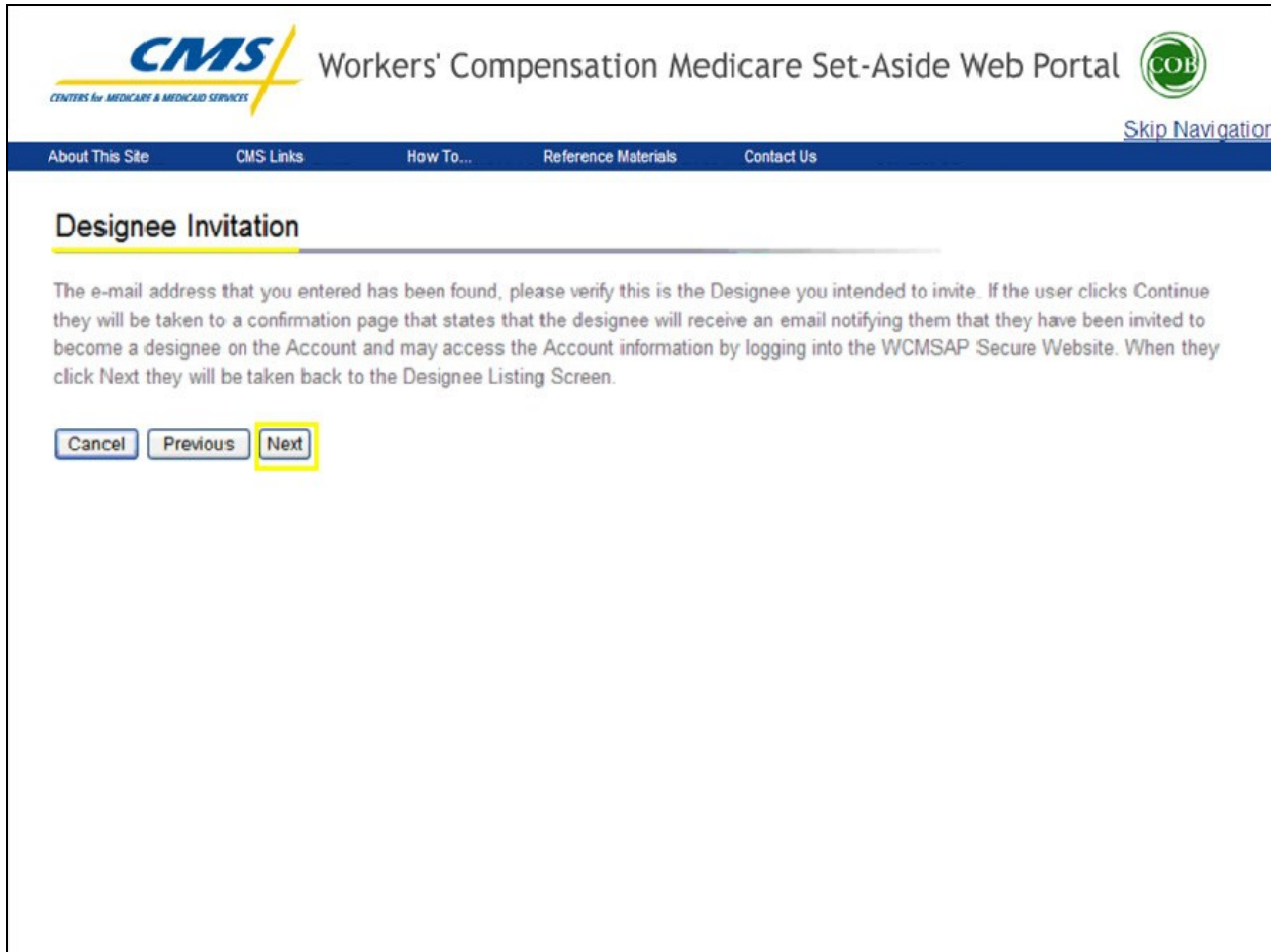
- System verifies that e-mail is not in the database for existing user
- Existing user can be an Account Designee as long as
  - They are not registered as Account Representative for any Account ID
  - Are not the Account Manager for the same Account ID

**Slide notes**

When Next is clicked, the system will verify that the entered e-mail address is not in the database for an existing user.

An existing, registered user can be an Account Designee for your Account ID as long as they are not already registered as an Account Representative for any Account ID, or the Account Manager for the same Account ID.

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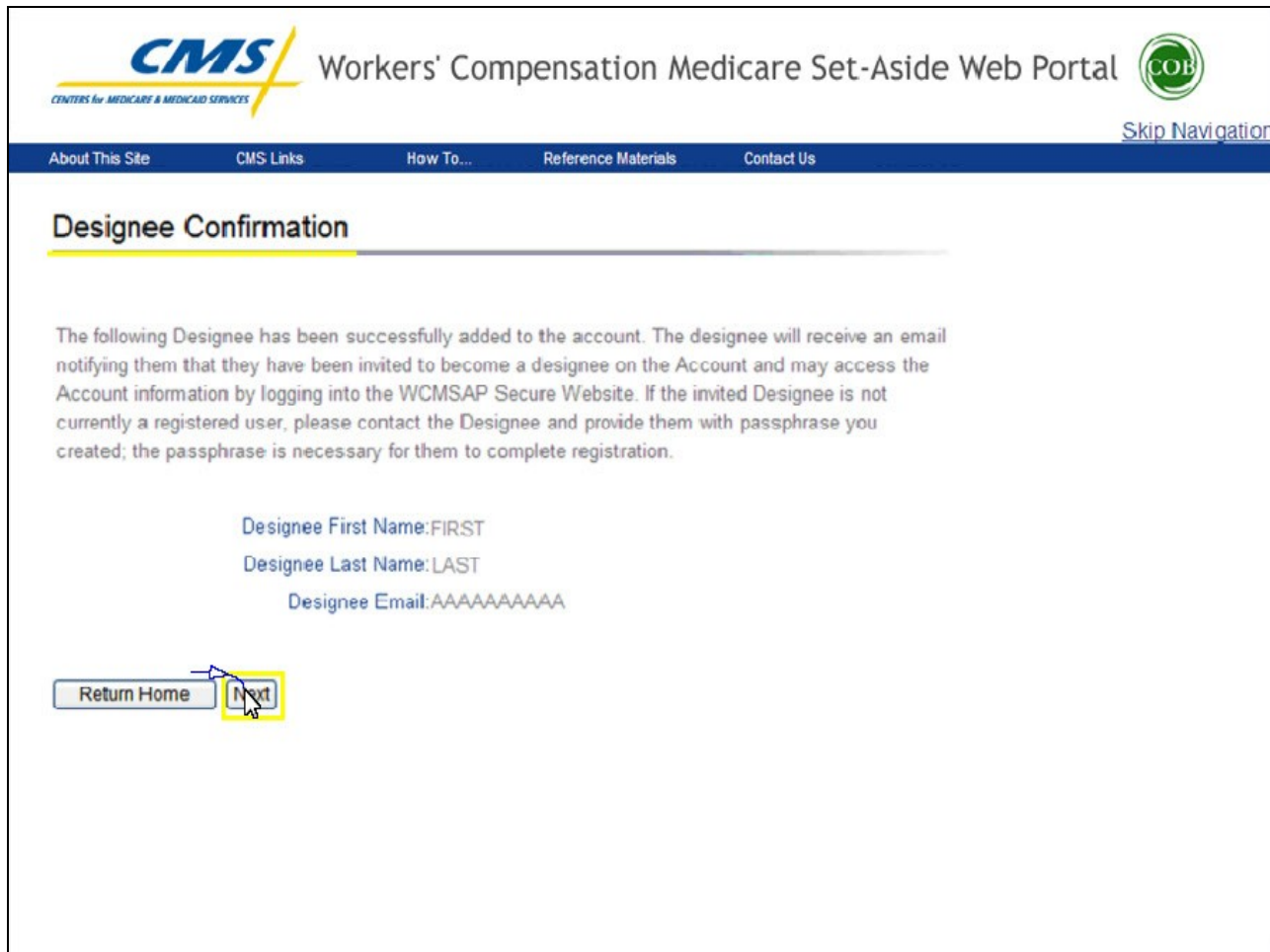
The screenshot displays the CMS Workers' Compensation Medicare Set-Aside Web Portal. The header includes the CMS logo (Centers for Medicare & Medicaid Services) and the COB logo. A navigation bar contains links: About This Site, CMS Links, How To..., Reference Materials, and Contact Us. A "Skip Navigation" link is also present. The main content area is titled "Designee Invitation" and contains the following text: "The e-mail address that you entered has been found, please verify this is the Designee you intended to invite. If the user clicks Continue they will be taken to a confirmation page that states that the designee will receive an email notifying them that they have been invited to become a designee on the Account and may access the Account information by logging into the WCMSAP Secure Website. When they click Next they will be taken back to the Designee Listing Screen." Below the text are three buttons: "Cancel", "Previous", and "Next". The "Next" button is highlighted with a yellow border.

## Slide notes


If the entered e-mail address is found in the system (i.e., the invited Account Designee is already a registered user), the Designee Invitation page displays.

The Account Manager must verify and confirm that the information entered is for the correct Designee by clicking Next.

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The screenshot displays the 'Designee Confirmation' page of the CMS Workers' Compensation Medicare Set-Aside Web Portal. The page header includes the CMS logo, the portal title, and a COB logo. A navigation bar contains links for 'About This Site', 'CMS Links', 'How To...', 'Reference Materials', and 'Contact Us', along with a 'Skip Navigation' link. The main content area features the title 'Designee Confirmation' followed by a paragraph explaining that a designee has been successfully added to the account and will receive an email invitation. Below this, the designee's details are listed: 'Designee First Name: FIRST', 'Designee Last Name: LAST', and 'Designee Email: AAAAAAAAAA'. At the bottom, there are two buttons: 'Return Home' and 'Next'. A mouse cursor is pointing at the 'Next' button, which is highlighted with a yellow box.

**CMS** Workers' Compensation Medicare Set-Aside Web Portal 

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## Designee Confirmation

The following Designee has been successfully added to the account. The designee will receive an email notifying them that they have been invited to become a designee on the Account and may access the Account information by logging into the WCMSAP Secure Website. If the invited Designee is not currently a registered user, please contact the Designee and provide them with passphrase you created; the passphrase is necessary for them to complete registration.



Designee First Name: FIRST  
Designee Last Name: LAST  
Designee Email: AAAAAAAAAA

[Return Home](#) [Next](#)

## Slide notes

The Designee Confirmation page will display. This page confirms that the invited Designee has been added to the account. The Designee will be sent an e-mail notifying them that they have been added to the Account ID. Click Next to continue.

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### Designee Listing

This page provides the Designee(s) information for the individuals you have assigned to the account.

An Account Manager can only make changes to a pending Designee. Once the Designee has registered and has a Login ID, the Account Manager cannot make changes to the Designee information other than deleting the Designee from the account.

To make changes to the account of a particular Designee listed, select the link on the individual's last name. To delete a Designee select the Delete function to the left of the individual's name. Use the **Add a Designee** function to include an individual as a designee. Individuals added as designees will receive an e-mail notifying them that they have been invited to be a designee for the account.

Delete	Last Name	First Name	E-mail Address	Passphrase	Status
X	LAST	FIRST	AAAAAAAAAAAAA	AAAAAAA	Active
X	<a href="#">LAST</a>	FIRST	AAAAAAAAAAAAA	AAAAAAA	Pending



[Add a Designee](#)   [Return Home](#)

## Slide notes

The Designee Listing page will re-display. The new Designee will be listed with an “Active” Status.



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### Designee Invitation

Please provide the name and a pass-phrase for the designee to enter during the registration process.

An asterisk (\*) indicates a required field.

Designee First Name: \*

Designee Last Name: \*

Passphrase: \*

Re-enter Passphrase: \*

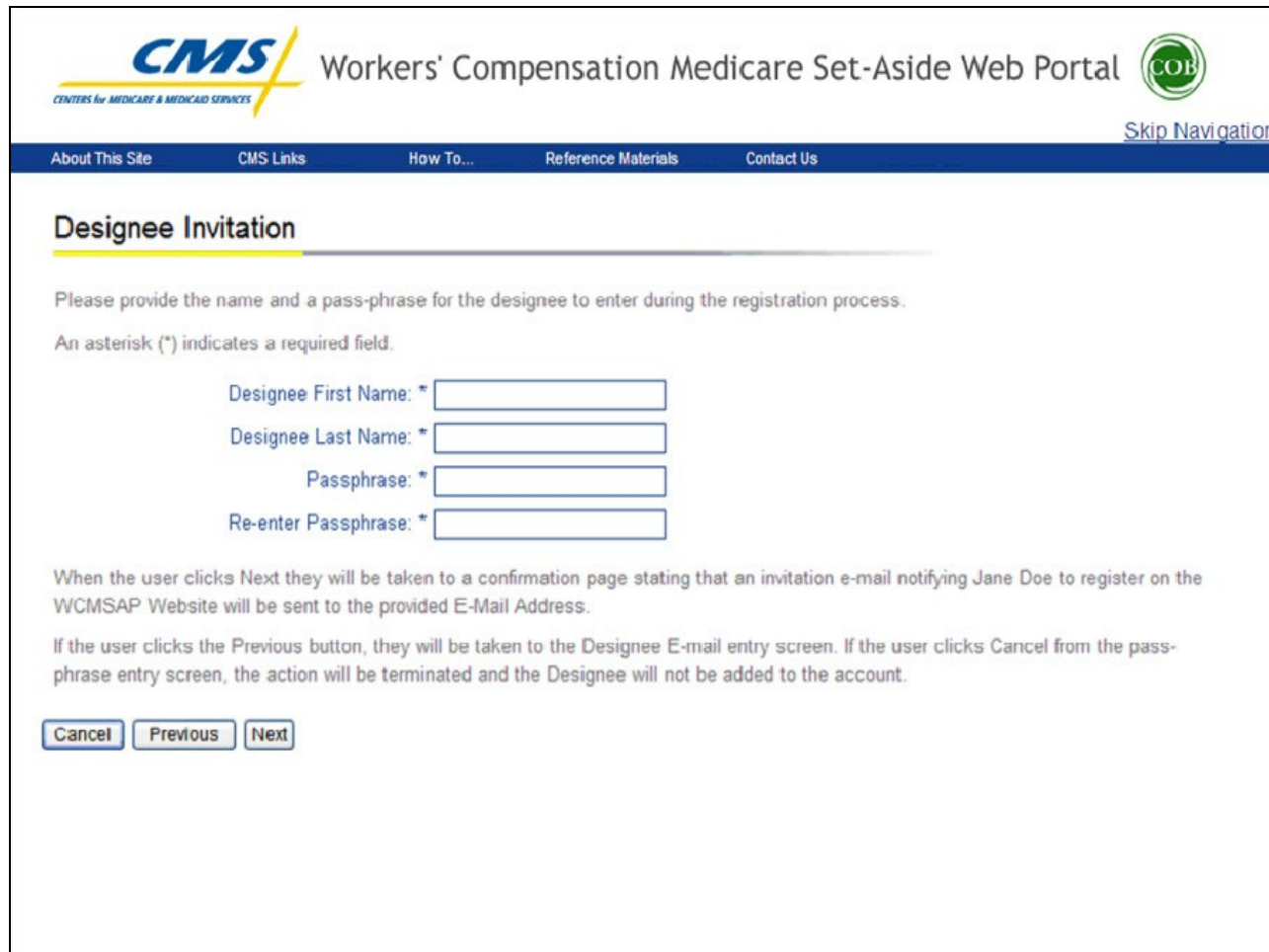
When the user clicks Next they will be taken to a confirmation page stating that an invitation e-mail notifying Jane Doe to register on the WCMSAP Website will be sent to the provided E-Mail Address.

If the user clicks the Previous button, they will be taken to the Designee E-mail entry screen. If the user clicks Cancel from the pass-phrase entry screen, the action will be terminated and the Designee will not be added to the account.

## Slide notes

If the Designee that is being invited is not a registered user (i.e., the entered e-mail address is NOT found in the system), the Designee Invitation page will display.

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The screenshot displays the 'Designee Invitation' page of the CMS Workers' Compensation Medicare Set-Aside Web Portal. The page header includes the CMS logo, the portal title, and a COB logo. A navigation bar contains links for 'About This Site', 'CMS Links', 'How To...', 'Reference Materials', and 'Contact Us', along with a 'Skip Navigation' link. The main content area is titled 'Designee Invitation' and contains instructions for providing a name and pass-phrase for a designee. It includes four required input fields: 'Designee First Name', 'Designee Last Name', 'Passphrase', and 'Re-enter Passphrase'. Below the fields, there is explanatory text about the confirmation page and the effect of clicking 'Previous' or 'Cancel'. At the bottom, there are three buttons: 'Cancel', 'Previous', and 'Next'.

**CMS** Workers' Compensation Medicare Set-Aside Web Portal COB

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### Designee Invitation

Please provide the name and a pass-phrase for the designee to enter during the registration process.

An asterisk (\*) indicates a required field.

Designee First Name: \*

Designee Last Name: \*

Passphrase: \*

Re-enter Passphrase: \*

When the user clicks Next they will be taken to a confirmation page stating that an invitation e-mail notifying Jane Doe to register on the WCMSAP Website will be sent to the provided E-Mail Address.

If the user clicks the Previous button, they will be taken to the Designee E-mail entry screen. If the user clicks Cancel from the pass-phrase entry screen, the action will be terminated and the Designee will not be added to the account.

**Slide notes**

Unregistered individuals must first be invited to be an Account Designee before they can become an Account Designee.

When the Designee Invitation page displays, the Account Manager must enter the First and Last Name for the individual they are inviting to be an Account Designee, and create a Passphrase (a short, case-sensitive phrase, up to 30 characters). The Passphrase is entered twice.

The Account Manager must contact their Account Designee and provide them with the Passphrase. The Account Designee will need this passphrase in order to register.

## Slide 35 - of 53

## Designee Maintenance

- Individual being invited as Account Designee will receive an e-mail notifying them of invitation
- Invitation e-mail will come from [cobva@ghimedicare.com](mailto:cobva@ghimedicare.com)
  - Account Manager should inform Designee to allow e-mail deliveries from this address
- When Account Designee receives invitation e-mail, they must click on the link provided and enter Passphrase
- Once registration is complete, they will be able to access this Account ID

### Slide notes

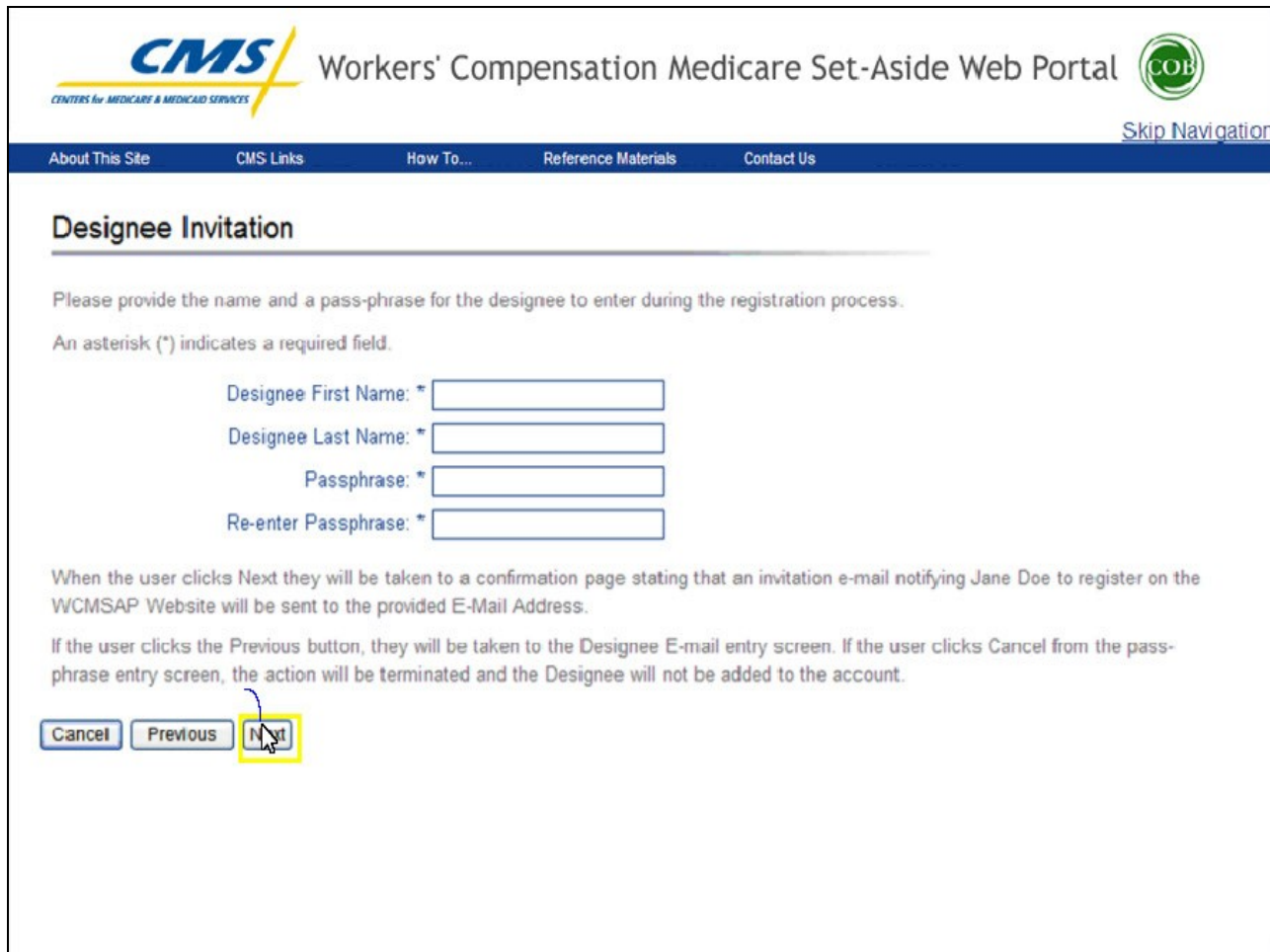
Once the invitation process is complete, the individual being invited as an Account Designee will receive an e-mail notifying them that they have been invited to be an Account Designee for the account.

The invitation e-mail will come from [cobva@ghimedicare.com](mailto:cobva@ghimedicare.com). The Account Manager should inform the Designee to allow e-mail deliveries from this address.


When the Account Designee receives the invitation e-mail, they must click on the link provided in the e-mail and enter the Passphrase that the Account Manager provided them with in order to successfully register for the WCMSAP.

Once the registration has been completed, they will be able to access this Account ID.

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The screenshot displays the 'Designee Invitation' page of the CMS Workers' Compensation Medicare Set-Aside Web Portal. The page header includes the CMS logo, the portal title, and a COB logo. A navigation bar contains links for 'About This Site', 'CMS Links', 'How To...', 'Reference Materials', and 'Contact Us', along with a 'Skip Navigation' link. The main content area features the title 'Designee Invitation' and instructions for providing a name and pass-phrase. It includes four required text input fields: 'Designee First Name', 'Designee Last Name', 'Passphrase', and 'Re-enter Passphrase'. Below the fields, explanatory text describes the next steps and the consequences of clicking 'Previous' or 'Cancel'. At the bottom, there are three buttons: 'Cancel', 'Previous', and 'Next'. A yellow box highlights the 'Next' button, with a blue arrow pointing to it from the left.

**CMS** Workers' Compensation Medicare Set-Aside Web Portal 

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### Designee Invitation

Please provide the name and a pass-phrase for the designee to enter during the registration process.

An asterisk (\*) indicates a required field.

Designee First Name: \*

Designee Last Name: \*

Passphrase: \*

Re-enter Passphrase: \*

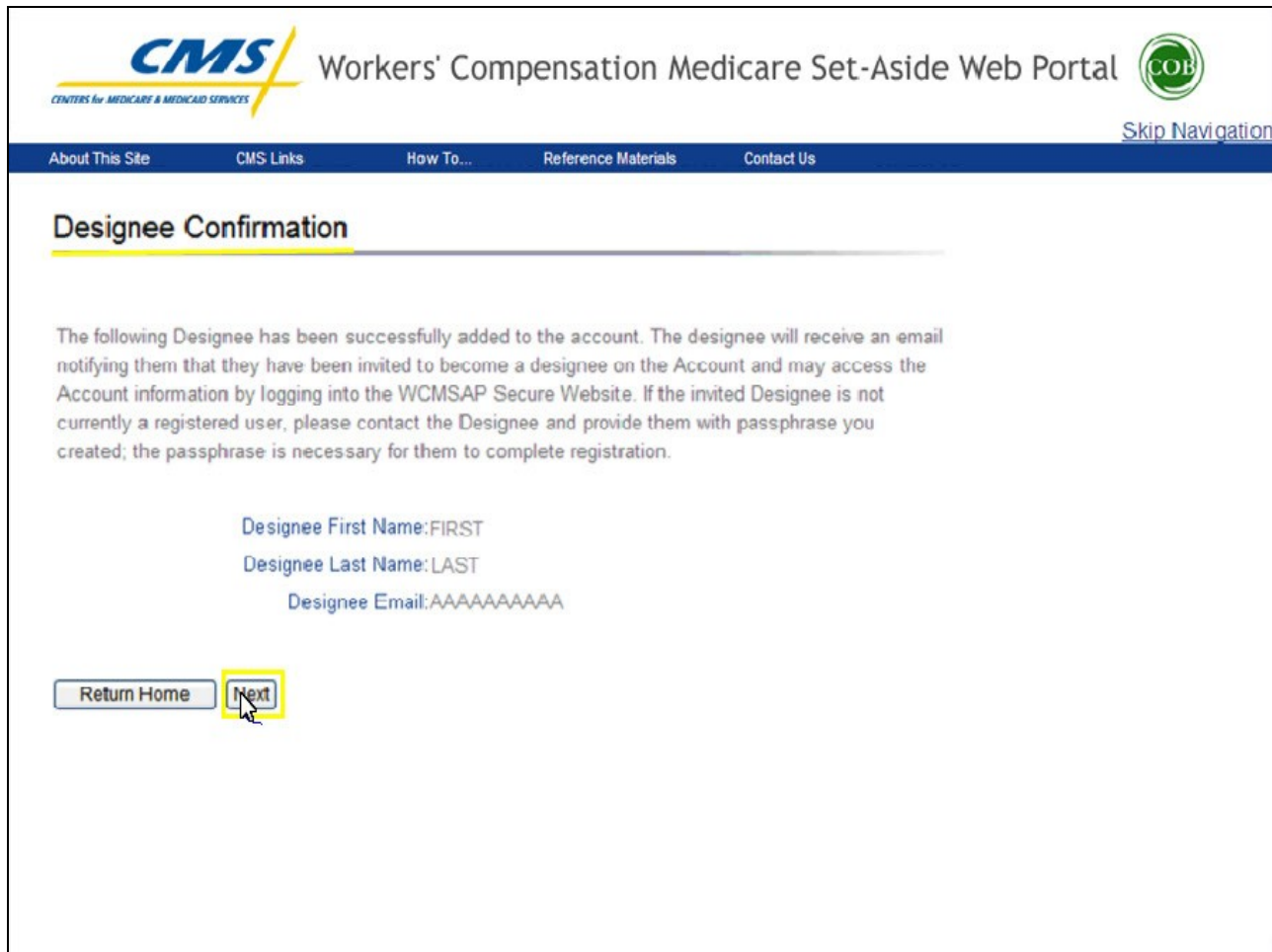
When the user clicks Next they will be taken to a confirmation page stating that an invitation e-mail notifying Jane Doe to register on the WCMSAP Website will be sent to the provided E-Mail Address.

If the user clicks the Previous button, they will be taken to the Designee E-mail entry screen. If the user clicks Cancel from the pass-phrase entry screen, the action will be terminated and the Designee will not be added to the account.

## Slide notes

Click Next to continue.

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The screenshot displays the 'Workers' Compensation Medicare Set-Aside Web Portal'. The header includes the CMS logo (Centers for Medicare & Medicaid Services) and the COB logo. A navigation bar contains links: 'About This Site', 'CMS Links', 'How To...', 'Reference Materials', and 'Contact Us'. A 'Skip Navigation' link is also present. The main content area is titled 'Designee Confirmation' and contains the following text:

The following Designee has been successfully added to the account. The designee will receive an email notifying them that they have been invited to become a designee on the Account and may access the Account information by logging into the WCMSAP Secure Website. If the invited Designee is not currently a registered user, please contact the Designee and provide them with passphrase you created; the passphrase is necessary for them to complete registration.



Designee First Name: FIRST  
Designee Last Name: LAST  
Designee Email: AAAAAAAAAA

At the bottom, there are two buttons: 'Return Home' and 'Next'. The 'Next' button is highlighted with a yellow box and a mouse cursor is pointing at it.

## Slide notes

The Designee Confirmation page will display. Click Next to continue.

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### Designee Listing

This page provides the Designee(s) information for the individuals you have assigned to the account.

An Account Manager can only make changes to a pending Designee. Once the Designee has registered and has a Login ID, the Account Manager cannot make changes to the Designee information other than deleting the Designee from the account.

To make changes to the account of a particular Designee listed, select the link on the individual's last name. To delete a Designee select the Delete function to the left of the individual's name. Use the **Add a Designee** function to include an individual as a designee. Individuals added as designees will receive an e-mail notifying them that they have been invited to be a designee for the account.

Delete	Last Name	First Name	E-mail Address	Passphrase	Status
X	LAST	FIRST	AAAAAAAAAAAAA	AAAAAAA	Active
X	<a href="#">LAST</a>	FIRST	AAAAAAAAAAAAA	AAAAAAA	Pending

[Add a Designee](#)   [Return Home](#)

## Slide notes

The Designee Listing page re-displays. The new Account Designee is listed with a status of "Pending."

## Slide 39 - of 53

## Edit Information for an Unregistered Account Designee

- Account Manager can edit personal information for “Pending” Account Designees
  - Have not yet registered on WCMSAP
- Account Manager can only view personal information for “Active” Account Designees
  - Cannot make changes to Account Designee’s information other than deleting them from the account

**Slide notes**

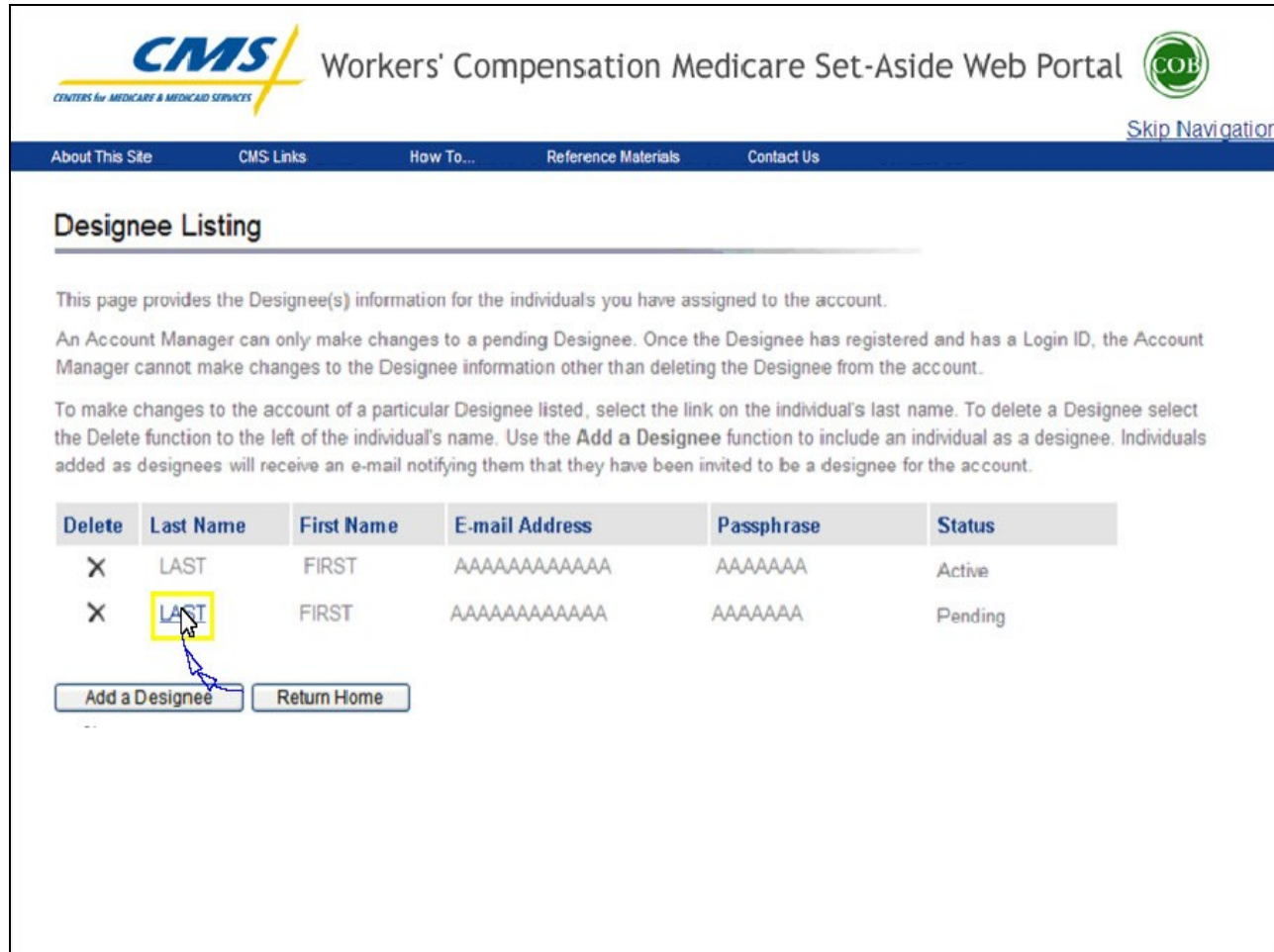
An Account Manager can edit personal information for Account Designees in “Pending” status.


Account Designees in “Pending” status have not yet registered on the WCMSAP. Account Managers can only view personal information for Designees in “Active” status.

Once the Designee has registered and has a Login ID, the Account Manager cannot make changes to the Account Designee's information other than deleting the Account Designee from the account.



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### Designee Listing

This page provides the Designee(s) information for the individuals you have assigned to the account.

An Account Manager can only make changes to a pending Designee. Once the Designee has registered and has a Login ID, the Account Manager cannot make changes to the Designee information other than deleting the Designee from the account.

To make changes to the account of a particular Designee listed, select the link on the individual's last name. To delete a Designee select the Delete function to the left of the individual's name. Use the **Add a Designee** function to include an individual as a designee. Individuals added as designees will receive an e-mail notifying them that they have been invited to be a designee for the account.

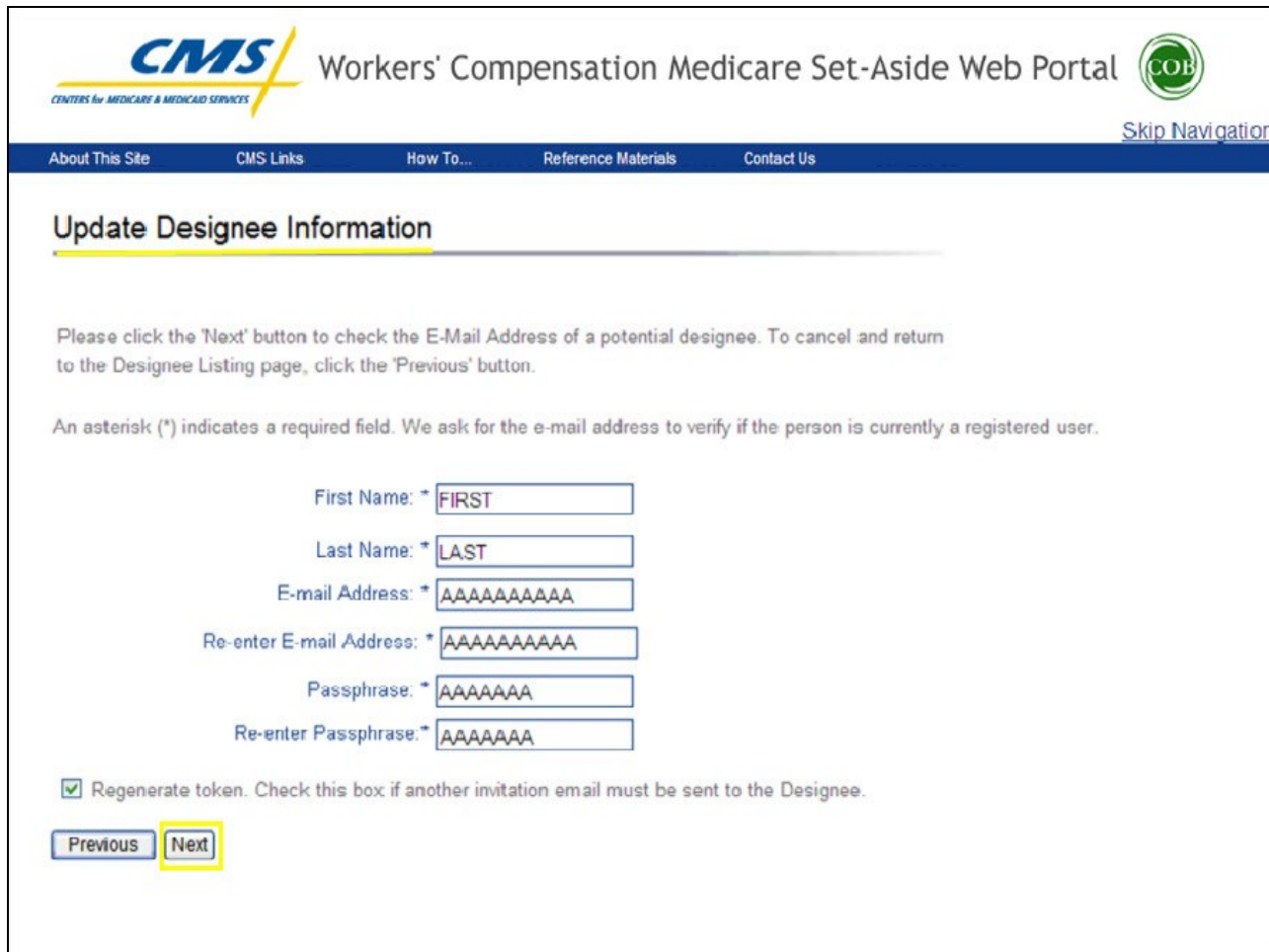
Delete	Last Name	First Name	E-mail Address	Passphrase	Status
X	LAST	FIRST	AAAAAAAAAAAAA	AAAAAAA	Active
X	<b>LAST</b>	FIRST	AAAAAAAAAAAAA	AAAAAAA	Pending

[Add a Designee](#) [Return Home](#)

## Slide notes

To make changes to the account of a particular Account Designee in "Pending" status, click the last name of the Designee whose information you wish to update.

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The screenshot displays the 'Update Designee Information' page of the CMS Workers' Compensation Medicare Set-Aside Web Portal. The page header includes the CMS logo, the portal title, and a COB logo. A navigation bar contains links: 'About This Site', 'CMS Links', 'How To...', 'Reference Materials', 'Contact Us', and a 'Skip Navigation' link. The main heading is 'Update Designee Information'. Below it, instructions state: 'Please click the 'Next' button to check the E-Mail Address of a potential designee. To cancel and return to the Designee Listing page, click the 'Previous' button.' A note explains that an asterisk (\*) indicates a required field and that an e-mail address is requested to verify if the person is currently a registered user. The form contains six input fields: 'First Name: \*' with 'FIRST', 'Last Name: \*' with 'LAST', 'E-mail Address: \*' with 'AAAAAAAAAA', 'Re-enter E-mail Address: \*' with 'AAAAAAAAAA', 'Passphrase: \*' with 'AAAAAAA', and 'Re-enter Passphrase: \*' with 'AAAAAAA'. A checkbox labeled 'Regenerate token. Check this box if another invitation email must be sent to the Designee.' is checked. At the bottom are 'Previous' and 'Next' buttons, with the 'Next' button highlighted by a yellow box.

## Slide notes

The Update Designee Information page displays, with the Designee's personal information open for editing. Edit the "Pending" Account Designee's information as needed. Click Next to continue.

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### Designee Listing

This page provides the Designee(s) information for the individuals you have assigned to the account.

An Account Manager can only make changes to a pending Designee. Once the Designee has registered and has a Login ID, the Account Manager cannot make changes to the Designee information other than deleting the Designee from the account.

To make changes to the account of a particular Designee listed, select the link on the individual's last name. To delete a Designee select the Delete function to the left of the individual's name. Use the **Add a Designee** function to include an individual as a designee. Individuals added as designees will receive an e-mail notifying them that they have been invited to be a designee for the account.

Delete	Last Name	First Name	E-mail Address	Passphrase	Status
X	LAST	FIRST	AAAAAAAAAAAAA	AAAAAAA	Active
X	<a href="#">LAST</a>	FIRST	AAAAAAAAAAAAA	AAAAAAA	Pending

## Slide notes

The Designee Listing page re-displays and the Designee's personal information will be updated.

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## Regenerate Invitation E-mail

- E-mail is generated when Account Manager invites Account Designee
  - Includes link for self-registration
- If Account Designee misplaces/deletes e-mail or has not registered within 30 days
  - Account Manager can regenerate e-mail
    - Only for Account Designees in “Pending” status
- Previous token link will not work once new e-mail is generated
- E-mail will come from cobva@ghimedicare.com



### Slide notes

When the Account Manager invites a person to be an Account Designee, an e-mail is generated and sent to the intended Designee informing them of the invitation, and includes a link for them to access the WCMSAP site and self-register as an Account Designee.

If the intended Designee has misplaced or deleted the invitation e-mail, or if the Account Designee has not registered within 30 days, the Account Manager can regenerate the invitation e-mail, allowing the intended Account Designee to self-register.

The previously-generated link will not work once a new e-mail is generated. Invitation e-mails can only be regenerated for Account Designees in “Pending” status. The e-mail will come from cobva@ghimedicare.com.

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### Designee Listing

This page provides the Designee(s) information for the individuals you have assigned to the account.

An Account Manager can only make changes to a pending Designee. Once the Designee has registered and has a Login ID, the Account Manager cannot make changes to the Designee information other than deleting the Designee from the account.

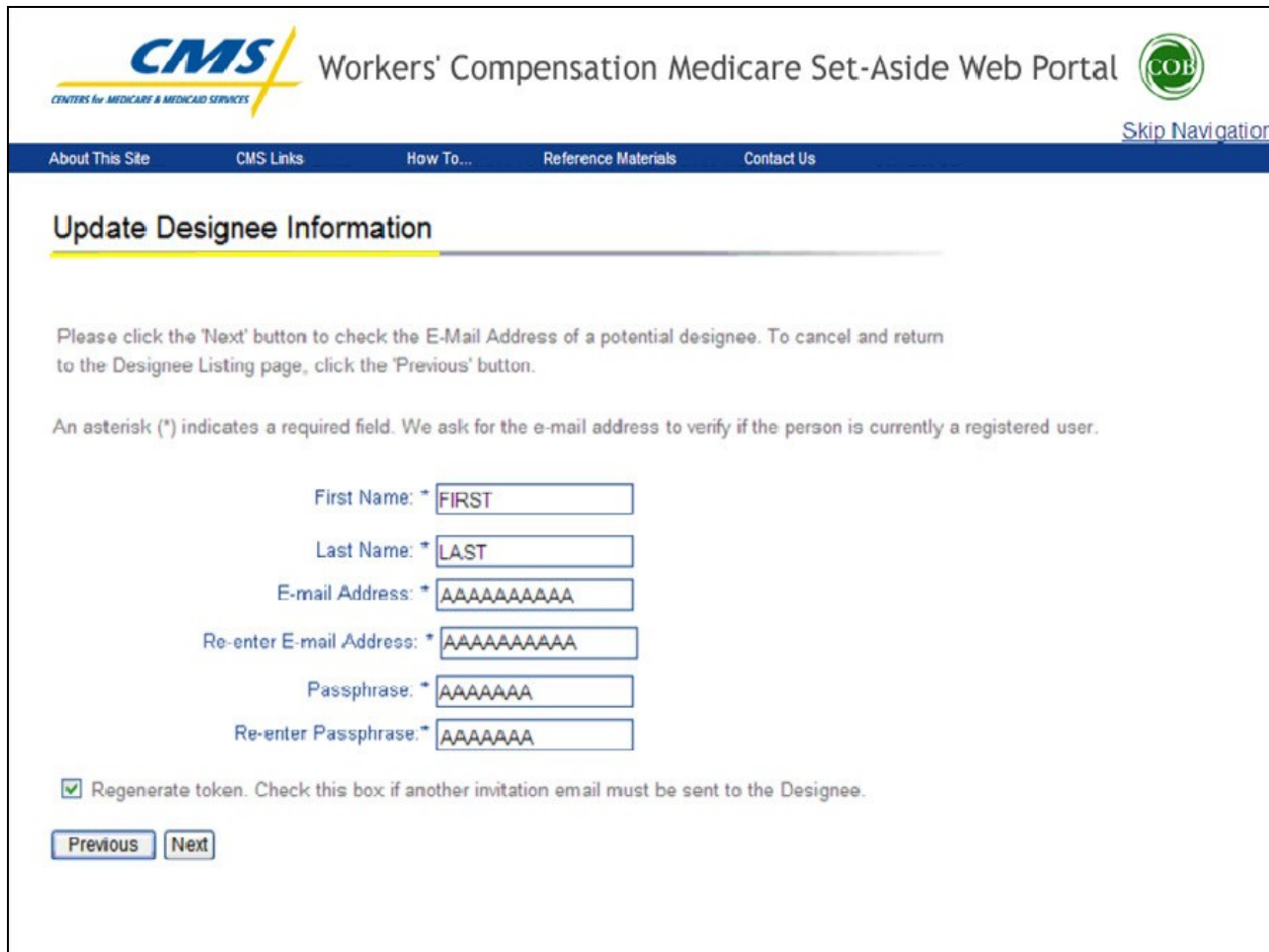
To make changes to the account of a particular Designee listed, select the link on the individual's last name. To delete a Designee select the Delete function to the left of the individual's name. Use the **Add a Designee** function to include an individual as a designee. Individuals added as designees will receive an e-mail notifying them that they have been invited to be a designee for the account.

Delete	Last Name	First Name	E-mail Address	Passphrase	Status
X	LAST	FIRST	AAAAAAAAAAAAA	AAAAAAA	Active
X	<a href="#">LAST</a>	FIRST	AAAAAAAAAAAAA	AAAAAAA	Pending

## Slide notes

On the Designee Listing page, click the last name of the Designee that needs the e-mail regenerated.

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The screenshot displays the 'Update Designee Information' page of the CMS Workers' Compensation Medicare Set-Aside Web Portal. The page header includes the CMS logo, the portal title, and a COB logo. A navigation bar contains links for 'About This Site', 'CMS Links', 'How To...', 'Reference Materials', and 'Contact Us'. A 'Skip Navigation' link is also present. The main content area features a title 'Update Designee Information' followed by instructions: 'Please click the 'Next' button to check the E-Mail Address of a potential designee. To cancel and return to the Designee Listing page, click the 'Previous' button.' Below this, a note states: 'An asterisk (\*) indicates a required field. We ask for the e-mail address to verify if the person is currently a registered user.' The form contains six input fields: 'First Name: \*' with 'FIRST', 'Last Name: \*' with 'LAST', 'E-mail Address: \*' with 'AAAAAAAAAA', 'Re-enter E-mail Address: \*' with 'AAAAAAAAAA', 'Passphrase: \*' with 'AAAAAAA', and 'Re-enter Passphrase: \*' with 'AAAAAAA'. A checkbox labeled 'Regenerate token. Check this box if another invitation email must be sent to the Designee.' is checked. At the bottom are 'Previous' and 'Next' buttons.

**Update Designee Information**

Please click the 'Next' button to check the E-Mail Address of a potential designee. To cancel and return to the Designee Listing page, click the 'Previous' button.

An asterisk (\*) indicates a required field. We ask for the e-mail address to verify if the person is currently a registered user.

First Name: \* FIRST

Last Name: \* LAST

E-mail Address: \* AAAAAAAAAA

Re-enter E-mail Address: \* AAAAAAAAAA

Passphrase: \* AAAAAAA

Re-enter Passphrase: \* AAAAAAA

☒ Regenerate token. Check this box if another invitation email must be sent to the Designee.

[Previous](#) [Next](#)


## Slide notes

The Update Designee Information page displays, with the Designee's personal information open for editing.



## Slide 46 - of 53

The screenshot displays the 'Update Designee Information' page of the CMS Workers' Compensation Medicare Set-Aside Web Portal. The page header includes the CMS logo, the portal title, and a 'Skip Navigation' link. A navigation bar contains links for 'About This Site', 'CMS Links', 'How To...', 'Reference Materials', and 'Contact Us'. The main content area features a title 'Update Designee Information' followed by instructions: 'Please click the 'Next' button to check the E-Mail Address of a potential designee. To cancel and return to the Designee Listing page, click the 'Previous' button.' A note states: 'An asterisk (\*) indicates a required field. We ask for the e-mail address to verify if the person is currently a registered user.' The form contains six input fields: 'First Name: \*' with 'FIRST', 'Last Name: \*' with 'LAST', 'E-mail Address: \*' with 'AAAAAAAAAA', 'Re-enter E-mail Address: \*' with 'AAAAAAAAAA', 'Passphrase: \*' with 'AAAAAAA', and 'Re-enter Passphrase: \*' with 'AAAAAAA'. A yellow box highlights the 'Regenerate token. Check this box if another invitation email must be sent to the Designee.' checkbox, which is checked. Below the box are 'Previous' and 'Next' buttons. A blue arrow points from the 'Next' button to the 'Regenerate token' checkbox.

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### Update Designee Information

Please click the 'Next' button to check the E-Mail Address of a potential designee. To cancel and return to the Designee Listing page, click the 'Previous' button.

An asterisk (\*) indicates a required field. We ask for the e-mail address to verify if the person is currently a registered user.

First Name: \*

Last Name: \*

E-mail Address: \*

Re-enter E-mail Address: \*

Passphrase: \*

Re-enter Passphrase: \*



☒ Regenerate token. Check this box if another invitation email must be sent to the Designee.

## Slide notes

Select the Regenerate token check box beneath the Designee's personal information and then click Next.



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### Designee Listing

This page provides the Designee(s) information for the individuals you have assigned to the account.

An Account Manager can only make changes to a pending Designee. Once the Designee has registered and has a Login ID, the Account Manager cannot make changes to the Designee information other than deleting the Designee from the account.

To make changes to the account of a particular Designee listed, select the link on the individual's last name. To delete a Designee select the Delete function to the left of the individual's name. Use the **Add a Designee** function to include an individual as a designee. Individuals added as designees will receive an e-mail notifying them that they have been invited to be a designee for the account.


Delete	Last Name	First Name	E-mail Address	Passphrase	Status
X	LAST	FIRST	AAAAAAAAAAAAA	AAAAAAA	Active
X	<a href="#">LAST</a>	FIRST	AAAAAAAAAAAAA	AAAAAAA	Pending

[Add a Designee](#)   [Return Home](#)


## Slide notes

The Designee Listing page re-displays, with the Designee's information unchanged. However, the system re-generates the invitation e-mail and sends it to the e-mail address registered for the Account Designee.

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## Designee Listing

This page provides the Designee(s) information for the individuals you have assigned to the account.

An Account Manager can only make changes to a pending Designee. Once the Designee has registered and has a Login ID, the Account Manager cannot make changes to the Designee information other than deleting the Designee from the account.

To make changes to the account of a particular Designee listed, select the link on the individual's last name. To delete a Designee select the Delete function to the left of the individual's name. Use the **Add a Designee** function to include an individual as a designee. Individuals added as designees will receive an e-mail notifying them that they have been invited to be a designee for the account.

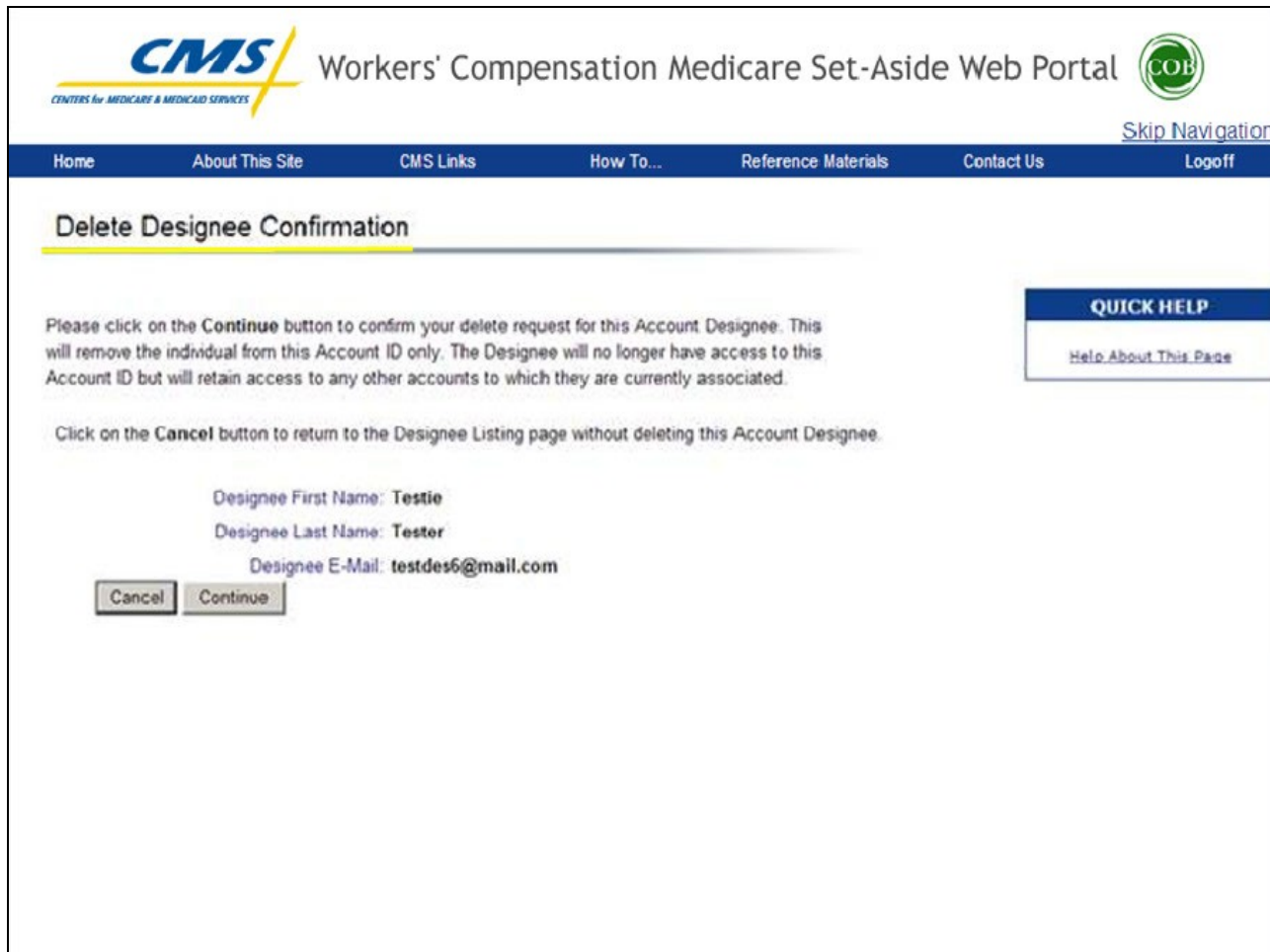
Delete	Last Name	First Name	E-mail Address	Passphrase	Status
X	LAST	FIRST	AAAAAAAAAAAAA	AAAAAAA	Active
X	<a href="#">LAST</a>	FIRST	AAAAAAAAAAAAA	AAAAAAA	Pending

Add a Designee
Return Home

Slide notes

To delete an Account Designee, click the X button next to the individual's name.

## Slide 49 - of 53



The screenshot displays the CMS Workers' Compensation Medicare Set-Aside Web Portal. The header includes the CMS logo, the text "Workers' Compensation Medicare Set-Aside Web Portal", and a COB logo. A navigation bar contains links: Home, About This Site, CMS Links, How To..., Reference Materials, Contact Us, and Logoff. A "Skip Navigation" link is also present. The main content area is titled "Delete Designee Confirmation". It contains instructions: "Please click on the **Continue** button to confirm your delete request for this Account Designee. This will remove the individual from this Account ID only. The Designee will no longer have access to this Account ID but will retain access to any other accounts to which they are currently associated." and "Click on the **Cancel** button to return to the Designee Listing page without deleting this Account Designee." Below this, the designee information is displayed: "Designee First Name: Testie", "Designee Last Name: Tester", and "Designee E-Mail: testdes6@mail.com". At the bottom are "Cancel" and "Continue" buttons. A "QUICK HELP" box on the right contains a link "Help About This Page".

**CMS** Workers' Compensation Medicare Set-Aside Web Portal COB

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### Delete Designee Confirmation

Please click on the **Continue** button to confirm your delete request for this Account Designee. This will remove the individual from this Account ID only. The Designee will no longer have access to this Account ID but will retain access to any other accounts to which they are currently associated.

Click on the **Cancel** button to return to the Designee Listing page without deleting this Account Designee.

Designee First Name: **Testie**  
Designee Last Name: **Tester**  
Designee E-Mail: **testdes6@mail.com**


**QUICK HELP**  
[Help About This Page](#)

## Slide notes

The Delete Designee Confirmation page will display.

## Slide 50 - of 53

The screenshot displays the CMS Workers' Compensation Medicare Set-Aside Web Portal. The header includes the CMS logo, the text 'Workers' Compensation Medicare Set-Aside Web Portal', and a COB logo. A navigation bar contains links: Home, About This Site, CMS Links, How To..., Reference Materials, Contact Us, and Logoff. A 'Skip Navigation' link is also present. The main heading is 'Delete Designee Confirmation'. The body text explains that clicking 'Continue' will remove the individual from the Account ID, while clicking 'Cancel' will return to the Designee Listing page. A 'QUICK HELP' box with a 'Help About This Page' link is on the right. Designee details are listed: First Name: Testie, Last Name: Tester, and E-Mail: testdes6@mail.com. At the bottom, there are 'Cancel' and 'Continue' buttons, with the 'Cancel' button highlighted by a yellow box.

**CMS** Workers' Compensation Medicare Set-Aside Web Portal 

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### Delete Designee Confirmation

Please click on the **Continue** button to confirm your delete request for this Account Designee. This will remove the individual from this Account ID only. The Designee will no longer have access to this Account ID but will retain access to any other accounts to which they are currently associated.

Click on the **Cancel** button to return to the Designee Listing page without deleting this Account Designee.


Designee First Name: **Testie**  
Designee Last Name: **Tester**  
Designee E-Mail: **testdes6@mail.com**

**QUICK HELP**  
[Help About This Page](#)

## Slide notes

If the Account Manager does not want to delete this Account Designee, they will click the Cancel button to return to the Designee Listing page which will show the Account Designee still listed with their status unchanged.

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**CMS** Workers' Compensation Medicare Set-Aside Web Portal 

CENTERS for MEDICARE & MEDICAID SERVICES

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### Delete Designee Confirmation

Please click on the **Continue** button to confirm your delete request for this Account Designee. This will remove the individual from this Account ID only. The Designee will no longer have access to this Account ID but will retain access to any other accounts to which they are currently associated.

Click on the **Cancel** button to return to the Designee Listing page without deleting this Account Designee.



Designee First Name: **Testie**  
Designee Last Name: **Tester**  
Designee E-Mail: **testdes6@mail.com**

**QUICK HELP**  
[Help About This Page](#)

## Slide notes

If the Account Manager does want to delete this Account Designee from the WCMSAP account, they will click the Continue button.

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**Workers' Compensation Medicare Set-Aside Web Portal**

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### Designee Listing

This page provides the Designee(s) information for the individuals you have assigned to the account.

An Account Manager can only make changes to a pending Designee. Once the Designee has registered and has a Login ID, the Account Manager cannot make changes to the Designee information other than deleting the Designee from the account.

To make changes to the account of a particular Designee listed, select the link on the individual's last name. To delete a Designee select the Delete function to the left of the individual's name. Use the **Add a Designee** function to include an individual as a designee. Individuals added as designees will receive an e-mail notifying them that they have been invited to be a designee for the account.

Delete	Last Name	First Name	E-mail Address	Passphrase	Status
X	LAST	FIRST	AAAAAAAAAAAAA	AAAAAAA	Active
X	<a href="#">LAST</a>	FIRST	AAAAAAAAAAAAA	AAAAAAA	Pending

## Slide notes

This removes the Account Designee from this Account ID only. The deleted individual will no longer have access to this WCMSAP account.

However, the Account Designee will retain access to any other Account ID they are currently associated with. The Designee Listing page redispays without the Account Designee who was just deleted.

## Slide 53 - of 53



You have completed the Basic Functions - Account Manager course. The information in this course can be referenced by using the document at the link below:  
<https://www.cob.cms.hhs.gov/WCMSA/help/userManual/WCMSAUserManual.pdf>

## Slide notes